College of Arts & Sciences Managers’ Meeting

Wednesday, September 14, 2022

10:30 a.m. – 12:00 p.m.

Zoom Recording

Welcome: Ashante Diallo, Associate Dean, Human Resources

UNC Gift Policies: Jen Clark, Director of Accounts Payable and Vendor Services, and Justin Hanford, Accounts Supervisor of Accounts Payable, Accounts Payable and Vendor Services

IMPORTANT: Changes are in progress for utilizing T&E cards for faculty dinners

Jen Clark emphasizes that business expenses, such as meals, no longer flow through AP and will now being going through Concur. As such, faculty members taking out a group to dinner should use their T and E cards. There are conversations about putting some structure around amounts in the above stated policy. Jen states the policy will come from the Controller’s Office.

IMPORTANT: Use of voucher system for hotel stays remains the same

Jen states that for guest speakers, one should be able to pay by voucher. There is a goal to move guest travel into Concur.

Here is the University policy on University-Related Business Entertainment.

ANNOUNCEMENT: Personal gifts not benefitting the university will not be reimbursed

Justin states that you will only be reimbursed for buying flowers if it benefits the university, but anything for a personal nature is not covered for reimbursement. Sympathy flowers for an employee and birthday parties will not be reimbursed, while flowers for a retirement party, donor gifts, and sympathy flowers for donor gifts will be. If the answer is not explicit, check with Accounts Payable.

IMPORTANT: Requirements for verification of domestic and foreign vendors

Jen states that she doesn’t have a specific time frame, but she hopes to try and get a new system in place for vendor management. In regards to the verification for foreign vendors, the ideal thing to do is ask the foreign supplier to provide their banking information on a document from their bank. Foreign IC is now an option in Connect Carolina. However, for domestic vendors, there must be a verbal verification, the ACH form must be completed, and the vendor’s email is also required. The IC form will likely be redone by the end of the fiscal year.
**Canvas Transition:** Andy Lang, Associate Dean of Information Technology and Data Analytics, and Suzanne Cadwell, Director of ITS Education Technologies

**IMPORTANT: Beginning transition to improved content management system: Canvas**

Andy discusses that a great resource for helping with the transition would be to visit “Moving from Sakai to Canvas”. There are informational videos available, and on Sept. 8th people will be able to interact with Canvas support directly. Another great resource is departmental tech support. Campus is also looking to have departmental workshops. The aim is to have no new course sites in Sakai after Fall of 2023. This doesn’t mean that Sakai will be turned off at the end of the Fall of 2023, but it may be soon after. Faculty may also request a non-course website, with a possibility for individuals external to UNC to visit the site, so those who do not have ONYENs can still interact with department sites when needed.

**Finance Announcements:** Elizabeth Bakanic, Associate Dean for Finance & Budget Management

**ANNOUNCEMENT: Education technology fee request system created**

Individuals now can submit requests via a new system for education technology fee requests through the annual report system. This will release at the beginning of next week and will encompass any instruction-related expense. E&T spending guidelines can now be found on the CASBO Website under “Spending” on the resources tab. This resource breaks down what is and is not appropriate to request for supplies.

**REMINDER: Identify your funds prior to contact with your budget analyst**

In the coming weeks, budget analysts will find out about any contributions for startup or retention packages that began this year or in the future.

**ANNOUNCEMENT: Tableau reports updated**

If you’re using the college school reports for tableau reports, a few of them have been updated to be more helpful and reflect the way funds are working now. The state carry over/ non-carry over account is now called “State Budget Reform”. It is split more along the lines of department programmatically owned state funds rather than the funds that are sitting in certain accounts, so it’s easier to see which funds are available to departments as a whole.

**ANNOUNCEMENT: Request for feedback**

If you are interacting with the commitment reports and notice there are places that could be more user-friendly, or desire certain fields to be present, please give your Budget Analyst, Elizabeth, or Joe feedback to make the process easier.
HR Announcements: Ashante Diallo, Associate Dean, Human Resources

ANNOUNCEMENT: ISSS visa processing

Joy Montemorano states that ISSS has hired new staff and developed a email queue system. Both will allow for quicker processing of visa requests. J1 requests should continue to be submitted to CAS at cas_j1@unc.edu. All other visa requests should be sent to ISSS@unc.edu.

ANNOUNCEMENT: Surplus System, Pcard and T&E card Access- Supplemental Forms are Required

Joy states that if you’re requesting these roles, they always require a supplemental form. Here is a helpful guide to both.

REMINDER: Staff Appreciation and Newsletter Subscription

Ashante reminds faculty to subscribe to lists such as the Wellness Newsletter and the Connect Carolina Digest. Employee Appreciation Day is October 21st. This should be a meeting free day. Encourage your team to participate in the activities!

IMPORTANT: EHRA conversion still in progress

Regarding the EHRA conversion for auditing business and finance professionals, Campus is still making determinations for who would be impacted or qualify for this conversion. You must be in a position that is FLSA exempt. Business officers in the college are exempt, but business service coordinators are not. Also, your position must be at least one third accounting function. Currently, this is an elective process and NOT mandatory.

Here is a list of FAQs about the EHRA-NF conversion.

Here is the link to the UNC HR page on EHRA Conversion for Auditing, Business, and Finance (ABF) Professionals.

Important Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan. 16, 2023</td>
<td>90-day conversion election period for eligible employees begins</td>
</tr>
<tr>
<td>January 2023</td>
<td>First two info sessions for employees and managers</td>
</tr>
<tr>
<td>March 2023</td>
<td>Third info session for employees and managers</td>
</tr>
<tr>
<td>April 16, 2023</td>
<td>90-day conversion election period for eligible employees ends</td>
</tr>
<tr>
<td>May 8, 2023</td>
<td>Effective date for employees choosing to convert to EHRA status</td>
</tr>
<tr>
<td>May 19, 2023</td>
<td>Last SHRA payday for converting employees</td>
</tr>
<tr>
<td>May 31, 2023</td>
<td>First EHRA-NF payday for converting employees</td>
</tr>
</tbody>
</table>